DOCUMENT RESUME

ED 277 099 EA 019 004

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TITLE Situational Leadership in Education: Realistic Data for Reform Decisions through Action Research.
PUB DATE Nov 86
NOTE 19p.; Paper presented at the Annual Meeting of the Southern Regional Council on Educational Administration (Atlanta, GA, November 9-11, 1986).
PUB TYPE Reports - Research/Technical (143) -- Speeches/Conference Papers (150)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Administrator Role; *Administrators; Decision Making; Elementary Secondary Education; Employed Women; Employer Employee Relationship; Interviews; Leadership Qualities; Leadership Responsibility; *Leadership Styles; Organizational Theories; Personality Measures; *Personnel Management; Research Needs; Research Utilization; Teacher Administrator Relationship
IDENTIFIERS *Hersey Blanchard Situational Leadership Model; *Tennessee

ABSTRACT

Theoretical concepts about situational management decisions are incorporated in an investigation of school administrators in Tennessee to determine (1) whether administrators can be identified who possess specified leadership characteristics and (2) if those leaders consider employee maturity criteria when selecting employees for tasks. The study focuses on Hersey and Blanchard's concept that followers' maturity levels are integral to leadership style. Utilizing the high flexibility/high effectiveness leadership characteristics from the theorists' instrument, researchers interviewed 66 school administrators to investigate the two study goals. Findings are presented in 15 tables. The study's primary purpose was accomplished; one-third of respondents scored above cutoff points for high flexibility/high effectiveness, thereby falling within high performance ranges. Regarding age, older men were proportionately better represented than younger men in the high performance categories; data for females do not show this trend. Twenty-nine percent of males scored in the two categories, compared to 50 percent of females. Respondents identified all but one maturity criterion as factors in choosing subordinates for tasks. Systematic research is needed to verify the use of maturity criteria, the male-female proportion in the high performance range, and the disparity in time females spend in classroom experience before obtaining administrative positions, as compared to males. (CJH)

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Situational Leadership in Education: Realistic Data for Reform Decisions through Action Research

SRCEA Annual Conference

Atlanta, Georgia

November, 1986

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Situational Leadership in Education:
Realistic Data for Reform Decisions through Action Research

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Introduction

Recent studies in leadership have emphasized situational management decisions, based on various factors such as the nature of the task, interpersonal relationships, and the relative abilities and maturity of followers. The notion of the importance of followers' maturity--whether individuals or the group as a whole--has gained in popularity in both business and education. Modern managers have been asked to become cognizant of the task dimension and the human relations dimension in dealing with employees.

Thus, the problem area of this study was to conduct a leadership study to determine, first of all, whether, among a population of educational administrators, individuals could be identified who possess specified leadership characteristics. Second, the problem was to determine if those identified leaders are consciously aware of employee maturity criteria when selecting employees for task assignments.

Initial studies of leadership began with trait theory--an attempt to define leadership by a study of characteristics of leaders (Longnecker & Pringle, 1984).

The trait theories were abandoned, however, as studies of leadership behavior became emphasized. Of special significance is the emphasis of current and recent past leadership studies on the two dimensions of task-orientation and relations-orientation on the leadership continuum.

The early studies at the University of Michigan identified two concepts called "employee orientation" and "production orientation," designations that parallel the task and relations dimensions (Katz, Macoby, & Morse, 1950). A few years later, members of Ohio State University developed the Leader Behavior Description Questionnaire (LBDQ) instrument in an attempt to describe how leaders perform their jobs. The Ohio State studies categorized leader behavior along the two dimensions of Initiating Structure (task) and Consideration (relations) (Stodgill & Coons, 1957). Significantly, these studies for the first time described leader behavior on two separate axes, rather than on a single continuum. The Ohio State studies found that task and relationship behavior were separate dimensions and not mutually exclusive.

Halpin (1959) studied school superintendents and further defined the task and relationship components. He suggested that task behavior consisted of the leader's delineating the relationship between himself and his followers, defining patterns of organization and communication, and establishing methods of procedures. Relationship behavior, on the other hand, referred to

friendship, trust, respect, and warmth in the relationships between leader and subordinate.

Blake and Mouton (1964) expanded the production (task) and concern for people (relationship) dimensions into a grid containing four quadrants. The horizontal axis represented task, while the vertical axis represented relationship. A high rating of "9" was possible either horizontally or vertically, and a low score of "1" was also possible in both. A "5,5" rating indicated a leader who was in the middle of the task/relationship dimensions.

The next series of studies kept the two dimensions of task and relationship, but added the idea that situational or contingency leadership was most effective (Fiedler, (1967; Reddin, 1967). Fiedler, for example, identified three important considerations as variables affecting whether task or relationship behavior was more appropriate for a given situation: leader-follower personal relations, task structure, and position power of the leader.

Hersey and Blanchard (1981, reprinted from 1974), the focus of this study, added to the leadership studies when they introduced the idea that the maturity level of followers should be considered when determining the most appropriate style of leadership. They defined maturity as "the ability and willingness of people to take responsibility for directing their own behavior" (1982, p. 151) and listed basic criteria for determining high maturity: the ability to set high but attainable goals, education and experience, ability, and willingness (p. 157).

Purpose

The authors of this paper believe that professional development programs, whether as part of a university's degree requirements or a local school system's staff development offering, will expedite the reform process to the degree that the educational enterprise is successful in systematic collection and review of information--both on what currently exists and those skills, competencies, approaches, and resources required to accomplish desired elevated planes of operations.

Based upon the concept of maturity levels of followers as the deciding factor for a leader in determining the relative balance of emphasis by that leader on the dimensions of task and relationship, the purpose of this study was twofold: (1) to see if it was possible to identify leaders in public education who possessed high flexibility/high effectiveness leadership characteristics set forth in the Leader Behavior Analysis instrument by Blanchard Training and Development (Appendix A for identifier), and (2) to determine if those identified leaders make a conscious application of Hersey and Blanchard's concept of maturity criteria.

A series of questions was posed by the authors to guide this exploratory work: Using the LBA-Self instrument, are there educational leaders who, in fact, meet flexibility criteria of the instrument while they simultaneously demonstrate a strong level of effectiveness? Do leaders

meeting the instrument's criteria also use Hersey/Blanchard maturity-level criteria in decisions regarding subordinates? Do these individuals decide their leadership strategies with subordinates at a conscious level? Are there any obvious demographic characteristics associated with leaders who demonstrate both flexibility and effectiveness?

Methodology

This study gathered and analyzed information concerning educational leaders and their situational decision-making skills. The study administered the LBA-Self, a commercially marketed instrument with established Alpha coefficients for reliability, to a population of administrators and supervisors in upper East Tennessee. The instrument measures perceived leadership style, emphasizing levels of effectiveness and flexibility of respondents to various situations. Established cut-off points were set for both levels, and the investigators began follow-up studies on respondents measuring in the top third of scores.

It was decided that when 20 or more of those leaders scored in the top third of both the flexibility and effectiveness scales, these leaders were to be interviewed to determine the maturity level criteria they employ in assessing subordinates. The interview guide was designed to place leaders in three situations in which they had to choose a subordinate to complete a specific task (Figure 1). The responses to the situations allowed the interviewer to probe for specific maturity criteria used by the leader in making the choices.

Figure 1
Interview Guide Administered to
Identified High Effective/High Flexibility Respondents

1. Identify someone in your own mind to whom you would turn to complete a critical report assigned to you by your superior.
   a. Why did you choose this person?
   b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?
2. Think about a project that's important to you personally. Identify someone to whom you would t rn to complete the assignment.
   a. Why did you choose this person?
   b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?
3. Think about a situation involving a project to be completed for your teachers. Identify someone to whom you would turn to complete the assignment.
   a. Why did you choose this person?
   b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?

Fourteen interviewers were recruited, trained in the administration of the LBA-Self, instructed in assessment of the leaders' pool, and trained in the final interview techniques. Sixty-six school-level administrators or central office supervisors were assessed; twenty-one were identified whose scores met established cut-off points. (Twenty-four additional leaders made the cut-off with sufficiently high effectiveness scores but did not meet the flexibility criteria.)

Findings

There were three major areas of findings that resulted from the analysis. The study's primary purpose was accomplished; that is, it was possible to identify, from a sample of administrators and supervisors, individuals

scoring in both high effectiveness and high flexibility categories. Approximately one-third of all respondents scored above the determined cut-off points, thus qualifying to be in the high performance ranges established for this study (Table 1).

Table 1
Instrument Results by Main Categories
(N=66)

Sex	High Flex./ High Effec.	High Effec. Only	All Others
Male	14	19	18
Female	7	5	3

Analysis of demographic characteristics revealed at least preliminary indications; for example, another finding for the sample used is that, in terms of age, older men were proportionately better represented than younger men in the high flexibility/high effectiveness categories; the data for the female respondents do not show the same trend. Table 2 illustrates the age/sex comparisons of all respondents, while Table 3 shows age/sex comparisons for the high flexibility/high effectiveness respondents.

Table 2
Comparison of Age and Sex of All Respondents
(N=66)

Sex	Age of Respondents				
	30- Under	31-40	41-50	51-60	61- Over
Male	2	19	16	12	2
Female	2	5	3	4	0

In addition, Table 3 shows that 29 percent of the males (14 of 51) scored in the high flexibility/high effectiveness categories, compared to 50 percent (seven of fourteen) of the female respondents.

Table 3
Comparison of Age and Sex of
High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Age of Respondents				
	30-Under	31-40	41-50	51-60	61-Over
Male	0	4	4	5	1
Female	1	3	1	2	0

Another point evident from the respondents' demographic data was that, while the years of administrative experience compared to classroom experience of the male respondents were nearly equal, classroom experience of the females was two and one-half times that of their administrative experience (Table 4).

Table 4
Comparison of Total Years Classroom Experience and
Total Years in Administration
(N=66)

Sex	Total Years Classroom Experience	Total Years Administrative Experience
Male	566	556
Female	226	89

A second question that the study wanted to answer was whether, in decision-making processes, respondents with high flexibility/high effectiveness scores consciously

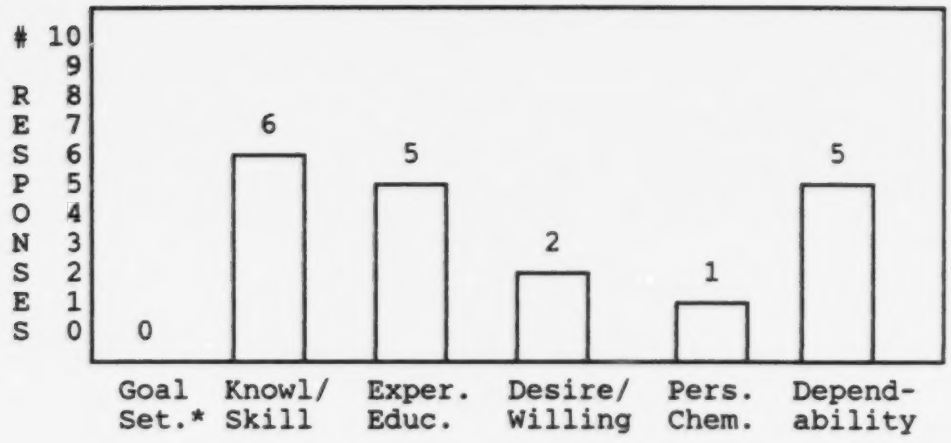
acknowledged Hersey and Blanchard criteria in terms of maturity of followers. Hersey and Blanchard (1982) identified basic components of maturity--all of which are to be considered in relation to a specific task to be performed: the ability to set high but attainable goals, willingness and ability to take responsibility, and education and/or experience.

In the follow-up interviews conducted with the high flexibility/high effectiveness respondents, the above maturity criteria were identified as being factors in choosing subordinates for specific tasks; however, there was one exception: subordinates' goal setting abilities were not identified as being a consideration by any of the respondents.

In addition, a significant finding was that two other factors were identified as often as--or more often than--the criteria listed by Hersey and Blanchard: dependability and personal chemistry were identified as being important considerations--depending upon the situation being discussed.

For example, when completing a task for one's superior, the category of dependability was an important consideration in subordinates (Table 5). Personal chemistry, on the other hand, was an important consideration when the task to be completed was for the respondent personally (Table 6) or for teachers (Table 7).

Table 5
Responses to "Factors in Choosing for the Superior"
(Question 1)



*(Goal Setting; Knowledge/Skills; Experience/Education; Desire/Willingness; Personal Chemistry; Dependability)

Table 6
Responses to "Factors in Choosing for the Respondent" (Personal)
(Question 2)

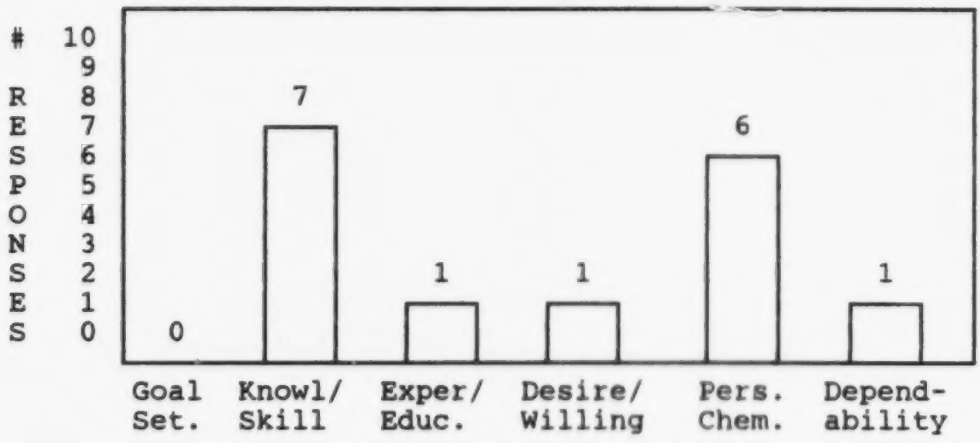
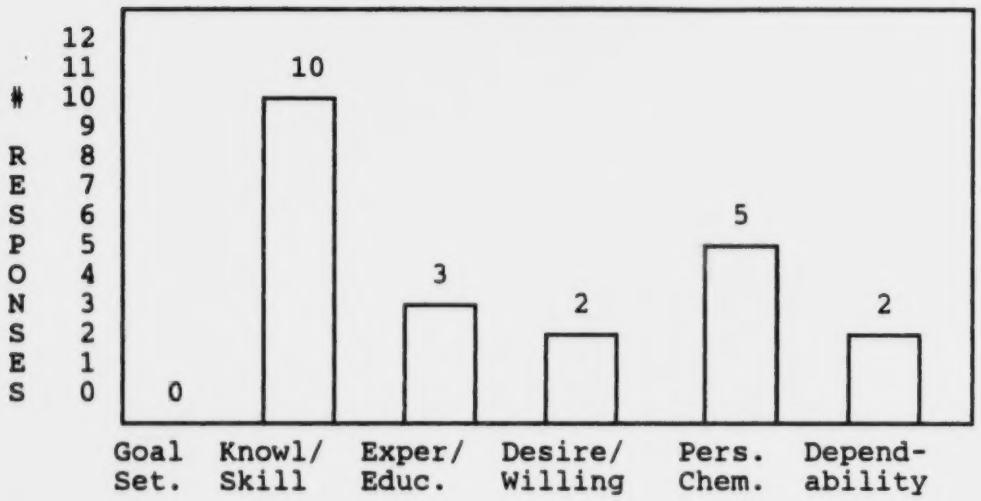


Table 7
Responses to "Factors in Choosing for Other Teachers" (Question 3)



The conclusions reached in this paper are understood to be limited to the population of the study. However, even the pilot, feasibility aspects of this study demonstrate the need for carefully controlled, systematic investigations--both to verify the demographics of this study (Appendix B) from a known, more representative population and to pursue a number of other issues: (1) obtaining a truer picture of the relative proportion of males and females in the high flexibility/high effectiveness range; (2) making a comparison of interviews of the top one-third and bottom one-third of respondents to determine if distinctions are evident, related to the use of maturity criteria in decision making; (3) conducting observations--or some other methodologies beyond self-reporting--to verify that the leaders are, in fact, using the criteria identified in the study.

Other issues raised by this study and worthy of further investigation include two questions raised concerning female respondents: the first is the percentage of females scoring in the high flexibility/high effectiveness range (50 percent) compared to the percentage of males (29 percent) with similar scores; a second is the apparent disparity in the length of time females must spend in classroom experiences before obtaining administrative positions, as compared to their male counterparts.

The contribution of this work is best described in terms of future effort, not the past. Potential for impact on the decision- and leadership styles of educational leaders can be recognized in the type of questions that were raised, if not in the questions themselves. Preliminary data are encouraging enough to indicate that practice may be improved through additional, large-scale, carefully controlled studies.

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Appendix A

LBA

Leader Behavior Analysis

Developed by Kenneth H. Blanchard, Ronald K. Hambleton, Drea Zigarmi and Douglas Forsyth

Self
Perceptions of Leadership Style

Directions:

The purpose of the LBA-Self is to provide you with information about your perceptions of your own leadership style. The instrument consists of twenty typical job situations that involve a leader and one or more staff members. Following each situation are four possible actions that a leader may take. Assume that you are the leader involved in each of the twenty situations. In each of the situations you must choose one of the four leader decisions. CIRCLE the letter of the decision which you think would most closely describe YOUR behavior in the situation presented. Circle only one choice.

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C D E F G

(Form A)

Appendix B

Additional Demographic Data

Table 8
Comparison of Age and Years in Administration
of High Effectiveness/High Flexibility Male Respondents
(N=14)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under							
31-40	1		2				
41-50	1	3			1		
51-60			1	3		1	
60+							1

Table 9
Comparison of Age and Years in Administration
of High Effectiveness/High Flexibility Female Respondents
(N=7)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	1						
31-40	1	2					
41-50		1					
51-60	1			1			
60+							

Table 10
Comparison of Age and Administrative Experience
of All Male Respondents
(N=51)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	2						
31-40	8	7	4				
41-50	2	6	4	3	1		
51-60		1	5	4	1	1	
60+			1				1

Table 11
Comparison of Age and Administrative Experience
of All Female Respondents
(N=15)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	2						
31-40	1	4					
41-50	2	1					
51-60	2	1	1	1			
60+							

Table 12
Comparison of Current Positions
of All Respondents
(N=66)

Sex	Elem. School	Middle/ Jr. High	High School	Central Office	Higher Ed.	Other
Male	15	6	16	10	3	1
Female	5	1	2	5	1	1

Table 13
Comparison of Current Positions
of High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Elem. School	Middle/ Jr. High	High School	Central Office	Higher Ed.	Other
Male	4		6	4		
Female	2	2		1	1	1

Table 14
Comparison of Highest Degree Earned by
Male and Female Respondents
(N=66)

Sex	Highest Degree Earned			
	BS/BA	MS/MA	Ed.S	Ed.D
Male	2	43	4	2
Female	1	13	1	0

Table 15
Highest Degree Earned Among
High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Highest Degree Earned			
	BS/BA	MS/MA	Ed.S	Ed.D
Male	0	12	1	1
Female	0	7	0	0